

CATAWBA COLLEGE
SCHOOL OF EVENING AND GRADUATE STUDIES
MGT 3990– STRATEGIC MANAGEMENT
SPRING 2014 BLOCK 4

I: General Information

Day, Time, & Location: Block 4, see Assignment Pages for Details
Levine Technology Building Room 4124

Instructor: Jeffrey J. Bowe, MBA, Doctoral Candidate

Contact Information: 704-202-1720; jjbowe@catawba.edu

Office Hours: Call for appointment. I am on campus several times per week, or we can meet at a mutually convenient location and time. Appointments can also be held by telephone or Skype.

II: Course Description & Rationale

An integrative capstone course examining the setting of strategic objectives, developing corporate strategies, and translating objectives and strategies into current operational plans.

The course will provide the student an opportunity to demonstrate and integrate research, analysis, and strategy formulation in a comprehensive learning environment.

Rationale: This course satisfies core requirements of the BBA. Prerequisites: MKT 2501, FIN 2535, MGT 2501, Senior Standing

III. Required Textbook and Other Materials

Required Text:

David, F. R. (2013). *Strategic Management, 14E*. Upper Saddle River, NJ: Pearson. ISBN: 978-0-13-266423-3

Bullock, R. & Weinberg, F. (2011). *The Little Seagull Handbook*. W.W. Norton and Company. ISBN-10: 0393911519 | ISBN-13: 978-0393911510

Strunk, W. & White, E.B. (2000). *The Elements of Style, Fourth Edition*. Needham Heights, MA: Pearson. ISBN-10: 0205313426 | ISBN-13: 978-0205313426

Microsoft Word and PowerPoint (or another presentation software such as Prezi) will be required for your business plan. PowerPoint can be purchased as a student version through the bookstore, or is available on all computers on campus. Prezi is a free online tool.

IV: Course Overview and Learning Outcomes

- 1) Define strategy and the strategic-management process.
- 2) Describe the nature and role of vision and mission statements in strategic management.
- 3) Identify and discuss major external forces that affect organizations.
- 4) Learn how to apply various strategic models including External Factor Evaluation (EFE), Internal Factor Evaluation (IFE), SWOT, Porter's Four Generic Strategies, SPACE Matrix, BCG Matrix, and QSPM, and define when each is appropriate.
- 5) Explain how to determine and prioritize a firm's internal strengths and weaknesses.
- 6) Explain the value of establishing long-term objectives.
- 7) Identify guidelines for when particular strategies are most appropriate to pursue.
- 8) Describe how to identify organizational culture and how to modify a culture to support new strategies.
- 9) Describe the relationships between production/operations and strategy.
- 10) Understand and apply market segmentation and product positioning as strategic implementation tools.
- 11) Analyze financial statements and conduct a thorough benchmark comparison to industry standards.
- 12) Discuss the role of auditing and contingency planning in strategic planning.
- 13) Explain the role of ethics in strategic management.
- 14) Explain the advantages and disadvantages of entering global markets.

V: Course Delivery, Assignments, and Assessment

As the capstone course, this is more of a mentoring course than a teaching course. The instructor will provide a framework for you to bring together the seemingly disparate disciplines of business into one final project. Therefore, you are expected to know and understand the concepts from the reading prior to any class that covers those topics.

The course includes case analysis, class discussion, online discussions, and substantial research and writing.

- 1) The course uses Blackboard for discussion and submission of concepts and cases which needs to be checked at least three times a week for announcements and updates to assignments. Discussion forums are an integral part of this class.
 - a. Online discussions will develop analysis and integration skills using high profile companies and management concepts which are then applied in the final project.
 - b. This will require, at a minimum, a thorough and analytical reading of the chapters and cases. Online discussion points are earned based on your contribution to these case discussions—not participating or participating

without capstone level depth and analysis will result in no points earned for that discussion. See the rubric for the timing of posting your initial discussion post and the required reply posts to other students.

- 2) Classroom discussions will focus on your course long project and specific cases reflecting concepts of strategic management. Only participation through critical and analytical contributions will earn discussion points. Participation is defined as a minimum of three (3) substantive and analytical comments reflecting course concepts properly applied to the respective case per class.
- 3) Case analysis will focus on several high profile companies in a variety of industries. Cases are due at 5PM on the date indicated.
 - a. A template for case analysis is provided in Blackboard. It is highly recommended that case analysis be submitted by completing the template, using proper grammar, sentence, and paragraph structure.
- 2) You will complete the Major Field Test from Educational Testing Services for a Bachelor's Degree in Business. This is a comprehensive test of the business field.
- 4) Grading Rubric for Case Analysis and Online Discussions

ONLINE DISCUSSION RUBRIC	MAX POSSIBLE	ADD'L CRITERIA
Requirements Writer addressed all objectives and questions of the assignment. Writer stayed focused on the topic, and shows clear evidence of thorough research.	9	All questions are answered—1 point for each element of a question not answered
Critical Thinking Writer uses critical thinking and analytical skills. Writer addresses assignment using insights and new applications. Writer interprets how new knowledge is useful to his/her learning.	9	Analysis and recommendations must use analysis and not simple reporting of facts and details
Mechanics Grammar Spelling Word choice Punctuation Sentence structure APA citations and references	4	More than 3 errors results in 1 point for every error; APA citations are 1 point for placement and accuracy.
Timeliness All posts are submitted as outline in the Blackboard assignment.	3	One point for initial post; one for each of two minimum reply posts. Points are not earned for posting after the due date
TOTAL	25	

CASE ANALYSIS RUBRIC	MAX POSSIBLE	ADD'L CRITERIA
Requirements Writer addressed all objectives and questions of the assignment. Financial history is included. Writer stayed focused on the topic, and shows clear evidence of thorough research.	21	All questions are answered—1 point for each element of a question not answered
Critical Thinking Writer uses critical thinking and analytical skills. Writer addresses assignment using insights and new applications. Writer interprets how new knowledge is useful to his/her learning. Financial analysis is included.	33	Analysis and recommendations must use analysis and not simple reporting of facts and details
Mechanics Grammar Spelling Word choice Punctuation Sentence and paragraph structure APA citations and references	6	More than 3 errors results in 1 point for every error; APA citations are 1 point for placement and accuracy.
TOTAL	60	

- 5) You will write a comprehensive case analysis of a company approved by the instructor. This case will include an industry competitive analysis, complete internal and external organizational analysis, comprehensive financial analysis including an industry benchmark comparison, review and analysis of current strategies, and recommendations for future strategy including at least one new or substantially revised strategy.

In your paper and your presentation, you must link the textbook with your analysis of the business. You must apply at least three tools and/or concepts from the textbook in your analysis and recommendations. Merely descriptive papers and presentations will not be acceptable. There are 27 cases analyses in the book and your analysis is to match that level of detail, analysis, and writing quality.

You must have at least fifteen separate and distinct reference sources. The company website and all subpages and/or variations count as one (1) source. You will need at least five (5) conceptual, academic, or theoretical sources that provide conceptual background for your personal analysis. The textbook should be your first conceptual source, and it is strongly advised that you find multiple academic journal articles to provide a foundation for your analysis. Wikipedia or any source that does not offer identification and qualification of its authors is not allowed. Slideshares and any

student paper below the doctoral course level are not acceptable. ***Any source that sells or in any format or manner distributes completed research papers is strictly forbidden as a source and can lead to an automatic failure of the final project.***

Your final paper must be at least 4500 words, not including title page, executive summary, charts and graphs, references, or appendices---the body of the paper must be at least 4500 words. A proper case analysis includes an executive summary, a logical sequence of topics with ample use of headings and subheadings to "guide the reader" through the analysis, easy to follow and appropriate charts and graphs, clearly stated assumptions, and a final set of recommendations with summary quantitative support if appropriate. Make sure you start and end strong. Poor case organization and/or writing can defeat a good analysis, so spend significant time on both elements of the assignment.

There are several milestones as part of this assignment and each is designed to improve your final project. Missing a milestone is likely to have a significant negative impact on your final project not because of the points not earned but because of the inability to receive mentored feedback.

You will present a PowerPoint or equivalent presentation of no more than 10 minutes highlighting your industry analysis, corporate SWOT, and financial ratio analysis.

It is highly suggested that you start on this project immediately. Just as in the business world, the final project cannot be turned in late.

Milestone #1: Selecting your company

You will submit a list of three companies that you are considering for your project, as well as at least three fully developed reasons for each company why that company would be a strong candidate for your project. Good reasons are career aspirations or needs of your particular industry; poor reasons are because you like to shop there or that you feel the company makes a good product. Note that the points assigned for milestones do not represent the amount of work required for that assignment—the value of the milestone is the feedback for the final project.

Milestone #2: Annotated bibliography.

An annotated bibliography of at least fifteen (15) sources is required; all sources must be less than five years old (for sources date by year only, that limit is 2009 or newer). Each source must be listed in proper APA format. A least 100 words are required per source indicating how that source will be used in the project. This is not a summary of the source, nor is it a description of the source. It is commentary on exactly where and how this source will be helpful in developing your final project. You can find sample annotated bibliographies online and one will be posted in Blackboard. Note that the points assigned for milestones do not represent the amount of work required for that

assignment—the value of the milestone is the feedback for the final project.

Milestone #3: Annotated outline.

You will create an annotated outline of your paper. This is not a simple listing of the headings from a sample case study online or in a textbook. Your outline must contain major points as Roman numerals (e.g., external analysis) and minor points (e.g., government regulations, international trade issues, demographics) directly related to your company. The annotated elements of your outline may contain exact copy that you will use in your paper showing details specific to your company analysis. These could be opening paragraphs or summary paragraphs of that particular section. You will need at least 100 words of narrative for each major point, plus properly formatted APA citations that tie to a reference list at the end of the outline. You should also have at least three minor bullet points under each major point, but there is no requirement for narrative under the minor points although the more that you submit the more feedback that you will receive. Note that the points assigned for milestones do not represent the amount of work required for that assignment—the value of the milestone is the feedback for the final project.

Milestone #4: Rough draft.

A rough draft represents a nearly final paper that needs minor structural work and proofreading. Your rough draft must be at least 4000 words. The only element not required in your rough draft is an executive summary; the executive summary is optional for the rough draft. Your rough draft must include all of the other required sections of the final paper. Note that the points assigned for milestones do not represent the amount of work required for that assignment—the value of the milestone is the feedback for the final project.

FINAL PROJECT RUBRIC	MAX POSSIBLE	ADD'L CRITERIA
<p>Milestone #1: Company list A list of 3 companies with theoretical reasons of why each company is a valid analysis is provided by the due date.</p>	10	
<p>Milestone #2: Annotated bibliography At least 15 credible and timely sources are identified At least 100 words indicating where and how that source is specifically applied to the final project are written for each source Each source is listed in proper APA format</p>	5 10 5	
<p>Milestone #3: Annotated outline All major headings are present with at least 100 words per point At least 3 minor bullet points under each major</p>	9 8	

point Proper APA citations throughout the outline and a properly formatted references page at the end	3	
Milestone #4: Rough draft Meets minimum word count (4000) Contains all of the required sections Critical thinking and analysis is correct, complete, and reflects course concepts Financial analysis is comprehensive and correct Overall format and structure of paper is correct; reasonable writing quality and all APA citations are in place with complete APA compliant references page	10 30 30 20 10	
Final Project: Executive Summary and Introduction A proper executive summary is present that summarizes the paper An introduction to the company and a brief history is present that frames the discussion of current strategy Includes an overview of the company and its products lines, geographical reach, and management structure	25	
Final Project: Industry Analysis Industry is correctly identified A complete Porter analysis is used to analyze the industry External industry factors are correctly identified as well as how they impact both the industry and individual companies within the industry Writer uses critical thinking and analytical skills.	25	Must use analysis and not simple reporting of facts and details
Final Project: Internal Analysis Complete SWOT analysis with at least four correct bullet points per S, W, O, and T A properly formatted SWOT diagram suitable for presentation to an executive is included within the paper Detailed narrative analysis of each bullet point including the level or priority of impact against the company now or in the future	25	Must use analysis and not simple reporting of facts and details
Final Project: Financial Analysis Comprehensive 3 year financial analysis is presented in readable table form including an		Must use analysis

<p>industry comparison</p> <p>A narrative describing the strength and weaknesses of the company's financials is correct and accurate and includes comments on its ability to meet strategic objectives</p>	25	and not simple reporting of accounting facts and details
<p>Final Project: Current Strategy</p> <p>A complete and accurate summary of the company's current strategy is present</p> <p>The strategy is analyzed for success or failure</p> <p>The analysis matches other elements of the case including industry factor analysis and company financial results</p>	25	
<p>Final Project: Ethical Concerns</p> <p>A detailed discussion of recent ethical lapses is present</p> <p>Any potential ethical issues due to the company's product or service are discussed along with a discussion using at least one relevant ethical foundation on how to resolve the dilemmas or challenges</p>	25	
<p>Final Project: Recommendations</p> <p>At least one relevant change in strategy is suggested</p> <p>The recommendation must be based on some element of the case analysis, and must be clearly tied to that element in the write up and reflect a concept from the text</p> <p>The financial impact of the change must be identified and discussed</p> <p>Plan of action contains proper level of detail and is consistent with concepts of the course.</p> <p>Any necessary changes in operations or marketing to implement the strategy must be identified</p>	25	
<p>Final Project: Overall Analysis and Application of Course Concepts</p> <p>Writer uses at least one other model from the text in analyzing the company and/or industry (note: this will appear in the proper section of the paper)</p> <p>Writer addresses assignment using insights and new applications.</p> <p>Writer interprets how new knowledge is useful to his/her learning.</p> <p>Writer stayed focused on the topic, shows clear evidence of thorough research.</p>	25	

Final Project: Mechanics and Structure Headings and subheadings Grammar Spelling Word choice Punctuation Sentence structure Word count is met	25	More than 3 errors per page results in 1 point for every additional error per page; Minus 1 point per 25 words short
Final Project: APA All citations are in place and correctly formatted References page meets APA requirements Title page formatted to APA Proper margins and double spaced Font size and consistency	25	APA citations and references are 1 point each for placement and accuracy.
Final Project: Presentation Presentation covers industry analysis, company SWOT, and financial analysis Presenter is able to answer questions from the audience on the company and its strategy	25	
TOTAL	425	

VI: Grades, Weights & Scale

Weights:

In Class Discussions 6 @ 25	=	150 points
Completing MFT	=	50 points
Online Discussions 3 @ 25	=	75 points
Case Analysis 5 @ 60	=	300 points
<u>Final Project</u>	≡	<u>425 points</u>
Total	=	1000 points

Scale:

A = 100-93 %	A- = 92-90%	B- = 81-80%
B+ = 90-88%	B = 87-82%	C- = 71-70%
C+ = 79-78 %	C = 77-72%	D- = 61-60%
D+ = 69-68 %	D = 67-62%	
F < 60%		

It is said that 90% of success is showing up. In this class, like business, that is not true. You start each class and online discussion at 0% of contribution points until you demonstrate that you have mastered the topic and concepts in depth and with the requisite knowledge that is required to translate the concepts into application.

There are several case studies in this course. It is highly recommended that you do additional research on each case, both by name and by topic, to contribute in the expected depth and breadth for each case. Breadth means understanding the issue involved, for example, a case involving retailing will require an understanding the retail cycle and how retailers acquire merchandise, which may require additional research into those topics.

The grade you receive for the course is intended to certify your demonstrated understanding of and mastery of the concepts and tools from the course. Your grade is not a reflection of your worth as an individual; it probably reflects the amount of time and effort you have been able to devote to the assignments. Smart people may have priorities other than getting a high grade in this course, and that is their prerogative.

VII: Academic Integrity and the Catawba College Student

Honor Code

"As a member of the Catawba College community, I will practice academic honesty, communicate truthfully, and show respect for the rights and property of others. I will also encourage others in the community to behave honorably."

Academic Dishonesty

"Academic dishonesty includes, but is not limited to, cheating, plagiarism, and lying about academic work. A student who submits the work of others, whether in whole or in part, without proper acknowledgement or permission, or who has falsified information within his own work, is in violation of the Honor Code, and is therefore subject to appropriate sanctions resulting from such a violation."

VIII: Attendance Policy:

Class attendance and discussion forum participation is required. As a hybrid class, attendance is different from a normal face to face class. Think of coming to class meetings as coming to a management meeting where you are expected to provide input on problems and issues based on your experience and background, and think of discussion forums as a remote management discussion held using technology.

Attending an online forum discussion means posting as required in the Blackboard assignment. If not post is made as required, the student is considered absent for that class session. Posting a required discussion after the due date will result in 0 points.

Two absences will result in a one letter grade deduction from the final grade. Catawba professors retain the right to fail any student who is absent from 25% of class sessions. *This policy is in the college catalog.* For this course, missing more than 2.25 classes can result in a grade of "F". A student who misses a class bears personal responsibility for completing any material or assignment presented during missed classes (see *The Catawba Catalog* for details.) The grade

letter penalty for missing two classes is a straight deduction after the earned points are calculated.

For face to face classes, students are expected to arrive to class on time, and be attentive and an asset to the learning process. Class discussion and presentation points cannot be made up if a face to face class is not attended.

Furthermore, each student is personally responsible for checking **CATAWBA email** (not Yahoo, AOL, Hotmail, gmail, or any other email) and visiting Blackboard at least three times a week for changes and updates to assignments.

Examples of an absence that will usually be Excused:

- Serious illness or injury requiring you to seek medical care and miss work for more than 48 hours prior to the class or online due date. If you are well enough to go to work, you are well enough to come to class and post your online work.
- Serious illness/injury of a direct family member (child, parent, sibling) which would cause the caregiver to be unable to attend work for more than 48 hours directly before the due date or class session.
- Funeral of a direct family member (child or step child, parent, sibling)
- Military duty

Examples of an absence that will NOT be excused for online work:

- Weddings including your own
- Protests, charity and fund-raising events, social or competitive events
- Work and/or business trips
- Internet connectivity problems

IX: Missed and Late Assignment Policy:

Late permission must never be assumed. Students are **required** to contact me **before** due dates if you have a reason for missing an assignment. Do NOT procrastinate. Requests are granted at the discretion of the instructor and partial credit or full credit will be given at the discretion of the instructor. However, you should never assume that late permission will be granted.

Discussion posts have set timelines in the rubric. Because they are to be a discussion, it is very unlikely that an extension will be granted unless requested more than 5 days before the due date.

X: Electronic Device Policy

Cell phone use in class is prohibited. This includes voice, text, video, email and data. Inappropriate (other than note-taking or class assigned research) use of a laptop, desktop or other electronic computing devices during class will result in the student's being asked to leave the room. An absence will be recorded for that day's class and the student will not be readmitted to class until he or she has met individually with the professor.

XI: Papers and APA Writing Requirements

This is a business course. In addition to all normal guidelines on plagiarism and academic dishonesty, all writing is to be submitted according to APA guidelines. There are numerous web resources on APA style writing including citations, reference pages, and the proper and acceptable use of source material. One of the best online resources is the Purdue Online Writing Lab which can be accessed at <http://owl.english.purdue.edu/owl/section/2/10/>. You are responsible for complying with APA format. As a business program, APA is the only acceptable format for academic writing. While feedback will be given on APA format, it is your responsibility to become familiar with it outside of the classroom.

XII: Course Content & Calendar

This schedule is subject to revision and change. Additional assignments, including readings, research, and papers, may be made during the course. Each student is responsible for any announcement or assignment made in class. The points per exercise are noted by each element.

April 10 Th	Class Meeting: Chapter 1 & 2 including Strategy and Mission and SWOT (25)
	Final Project: Milestone 1 Due by 5PM (10)
	Case Analysis: Southwest Airlines (60)
April 14 Mo	Class Meeting: Chapter 3 including External Assessment and Porter (25)
	Case Analysis: Amazon (60)
April 17 Th	Class Meeting: Chapter 4 including Internal Assessment and Financial Ratios (25)
	In-class discussion of selected student projects (randomly picked in class)
	Final Project: Milestone #2 Annotated Bibliography (20)
	Case Analysis: VF Corp (60)
April 24 Th	No Class Meeting Chapters 5 and 6
	Final Project: Milestone #3 Annotated Outline Due (20)
	Case Analysis: Coca-Cola as online discussion (60)
April 26 Sat	No Class Meeting
	Online Discussions: Small v. Large Company Strategy Formulation (25) Subjectivity v. Objectivity in Strategy Formulation (25) Continue and complete Coca-Cola online discussion
April 28 Mo	Class Meeting: Chapter 7 Implementing Strategy and Operations (25)
	In class discussion of Outlines (randomly picked in class)
May 1 Th	Class Meeting: Chapter 8 including Marketing, Finance, R&D, and MIS (25)
	Final Project: Milestone #4 Rough Draft (100)
May 5 Mo	Class Meeting: Chapter 9 including Review and Evaluation (25)
	Completion of Major Fields Test (50)
	Case Analysis: Royal Caribbean (60)
May 8 Th	Class Meeting: Presentations (25)
	Final Project: Papers due 5PM (250)
	Online Discussion: Learning Experiences (due 5PM) (25)

Note: Business is a brutal sport with brutal consequences for lack of preparation. So is this course. You may need to read each chapter multiple times as well as additional sources of studying to grasp the concepts required to demonstrate mastery throughout the course.